Retirement - Voluntary

Introduction

In EHRP, the personnel action performed for a voluntary retirement is processed on the **Data Control** page with a NOA 302-0. Additional data will be entered on the Retirement /Separation page upon completion of the personnel action.

Navigational Path

Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ HR Processing

Or

Access the item using the Worklist.

Navigational Tips

- The icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.
- The icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

Procedure

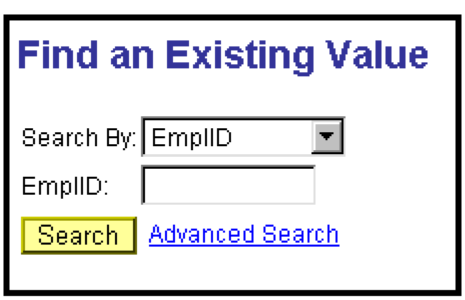
The following steps detail the procedure for processing a retirement in EHRP.

1

Follow the Navigational Path:

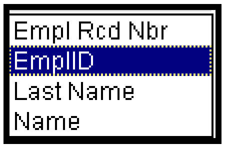
Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ HR Processing

The **Find an Existing Value** page appears.



2 Select the variable you would like to **Search By** from the drop down list.

The search options include:



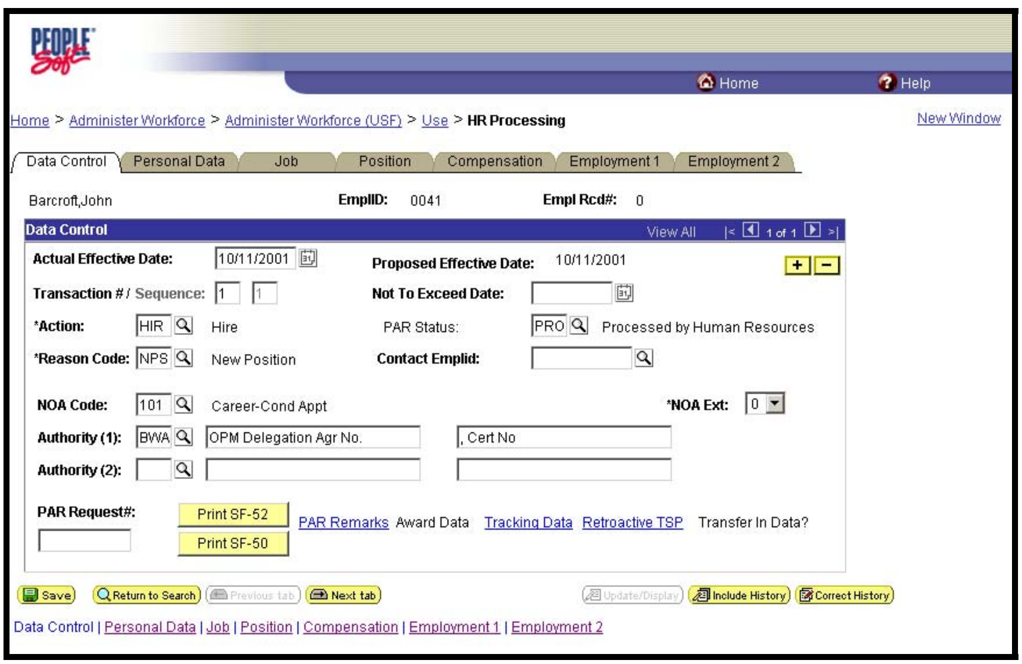
3 Enter the appropriate variable in the next field. (for example, Last Name)

4 Click 

.

5 Select the appropriate employee.

The following **Data Control** appears:



NOTE: The ***Data Control*** *page will be populated with the most recent personnel action performed for the selected employee.*

6 Click the  in the **Data Control** box to insert another row into the employee's record.

7 Enter the **Actual Effective Date** of the employee's retirement.

8 In the **Action** field, enter "RET" (Retirement).

9 In the **Reason Code** field, enter "VRE" (Voluntary Retirement).

10 Enter the applicable **NOA Code**.

11 Select the correct **NOA Ext** form the dropdown menu.

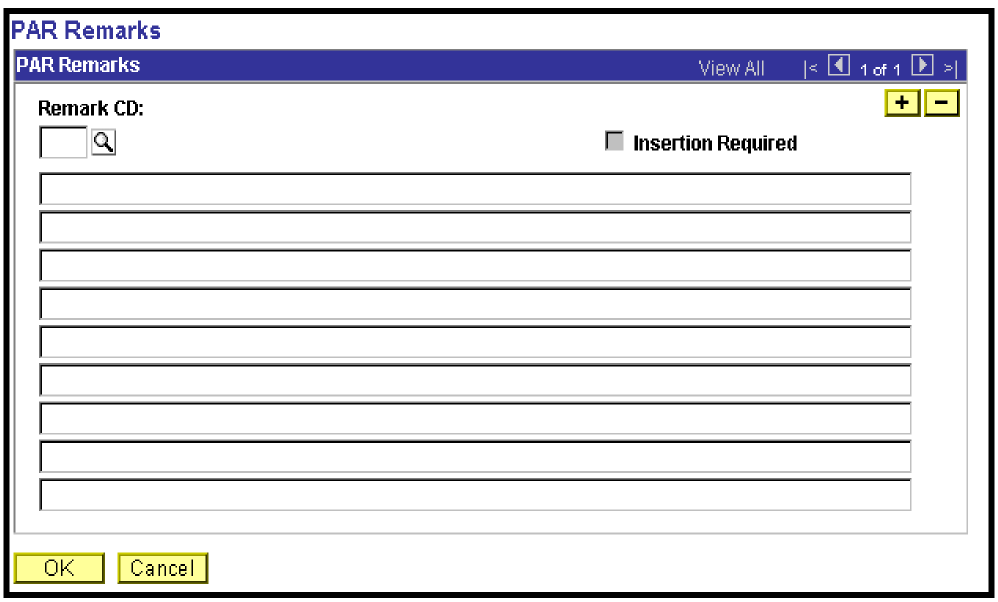
12 For **Authority (1)**, enter the correct legal authority.

13 If applicable enter **Authority (2).**

14 In the **PAR Request #** field, enter the applicable PAR Request number.

15 To enter **PAR Remarks**, click the hyperlink of the same name.

The following **PAR Remarks** sub-page appears:



16 Enter the applicable **Remark CD (Code)** and tab out of the field to see the text of the remark.

NOTE: To add additional remarks, use the  *to insert a row.*

*NOTE: If the **Remark CD** contains a "****", you must replace the asterisks with specific information. (i.e. this field may prompt you to enter date)*

*NOTE: To enter a freeform remark, enter "ZZZ" in the **Remark CD** field. Enter applicable remark text in sentence format. Text should fill the line. Once the line is filled, move to the next line. There is no autowrap feature. Do not hyphenate across lines. If a word requires hyphenation, move it to the next line. Do not use bullets or dashes. The "ZZZ" remark can only be used once for each personnel action. .*

NOTE: Within the EHRP system, there is no limit to the number of remarks that can be captured.

Mandatory Remarks

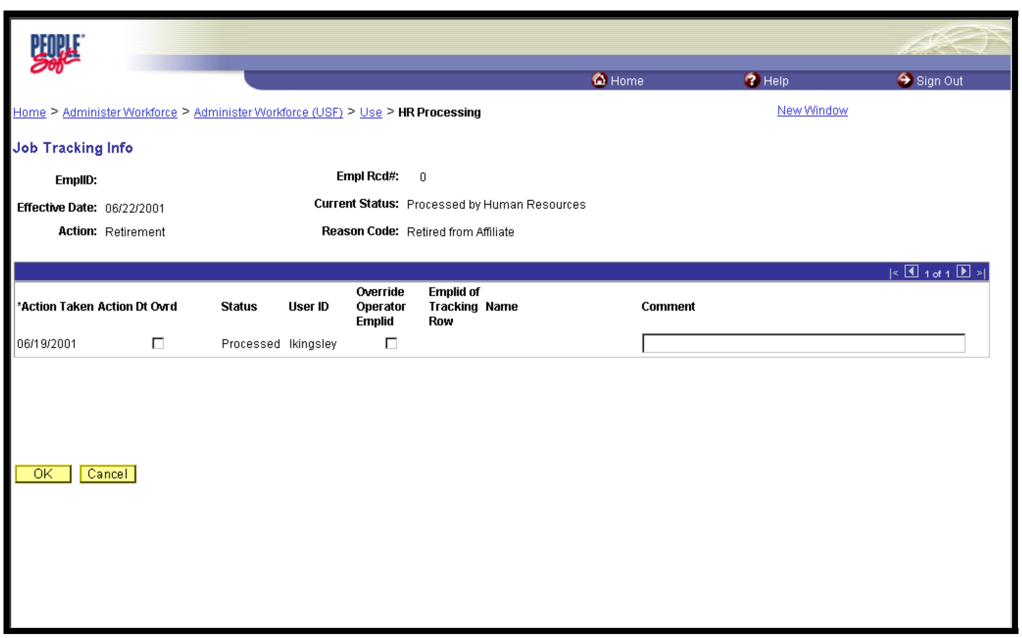
The system does not generate or suggest mandatory remarks that need to be entered in accordance with the NOA Code you are processing. Use the appropriate remarks based on OPM processing guidelines. There will no longer be HHS specific remarks for entry, except for the freeform ZZZ.

Procedure (cont'd)

16 When you are finished entering your PAR Remarks, click OK to return to the **Data Control** page.

17 Click on the **Tracking Data** hyperlink.

The following **Job Tracking Info** sub-page appears:



18 In the **Comment** field, enter the employee's contact name and phone number.

*NOTE: There is a 30 character limit in the **Comment** field.*

19 Click OK to return to the **Data Control** page.

20 Return to the **Data Control** tab and change the **PAR Status** according to your role.

21 Click Save.

In order for the legacy system to receive the employee's separation address, a separation address PAR must also be performed. Insert another row into the employee record and enter the following data:

22 Click the + in the **Data Control** box to insert another row into the employee's record.

23 Enter the **Effective Date** in the **Effective Date Field**. It should be the same effective date as the effective date on the Separation row of data previously entered.

24 Enter **DTA** in the **Action** field.

25 Enter **DTA** in the **Reason** field.

26 Enter **999** in the **NOA** field

27 Enter **8** in the **NOA Ext** field.

28 Click Save.

Additional Updates – Benefits and Pay

If additional changes need to be made to the employee's record, perform the changes. For example, if the employee's separation address will differ from their current address, you must perform an Address Change and make the update. Be particularly aware of and insure the employee's separation address is documented. Verify the following items and modify as necessary: Life Insurance, separation incentive payment, health insurance and military retirement pay.

All benefits and pay actions must be stopped. A NOA is not needed to terminate these benefits and pay actions. Follow the applicable procedures to stop the benefits and pay.

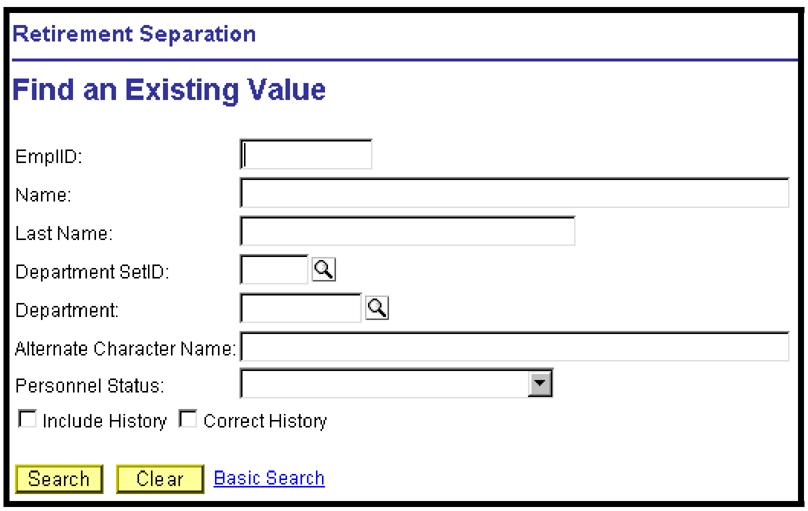
Retirement Separation page

Upon a retirement, certain data needs to be sent to OPM. This data is usually provided by the employee in their retirement packet, and includes retirement information such as address, federal tax data, life insurance and other data needed by OPM. Once the separation action is entered in the Data Control page, the additional data must be entered in the Retirement Separation Data page by following the navigational path below.

Navigational Path

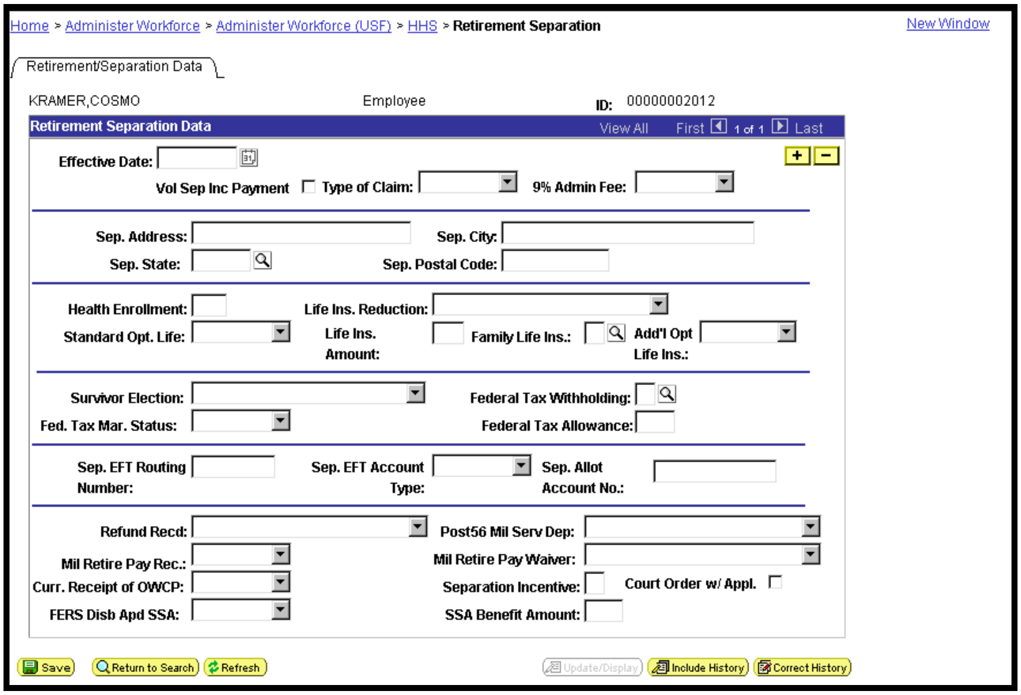
Home ➔ Administer Workforce ➔ Administer Workforce (USF) HHS ➔ Retirement Separation

29 The **Find an Existing Value** page appears.



30 Enter search data to locate the employee.

31 Select the correct employee.



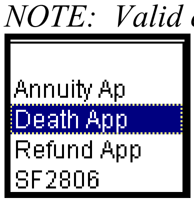
32 Enter the effective date of the separation, in the **Effective Date** field.

33 Check the **Vol Sep Inc Payment** checkbox if applicable.

NOTE: When this field is checked, it indicates the employee separated under Section 8336(d) of the U.S. code and received a Voluntary Separation Incentive Payment.

34 Select the appropriate type of claim from the **Type of Claim** dropdown list.

NOTE: Valid claim types include:



35 Indicate whether or not the agency pays the **9% Admin Fee.**

36 Enter the separating employee's home address in the **Sep Address** field.

37 Enter the city in which the employee will reside post separation in the **Sep City** field.

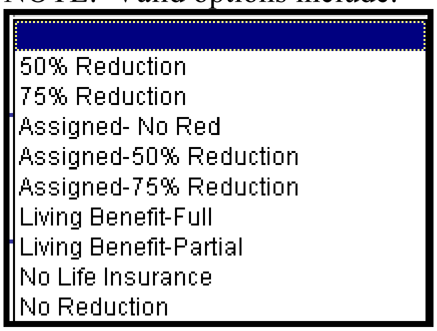
38 Enter the state of residence for the employee in the **Sep State** field.

39 Enter the zip code of employee’s residence in the **Sep Postal Code** field.

40 In the **Health Enrollment** field, enter the code used to identify the type of health benefits enrollment that will be continued into retirement or type of enrollment at the time separation.

41 Select the appropriate reduction to life insurance in the **Life Ins Reductions** dropdown menu.

NOTE: Valid options include:



42 Indicate whether or not the employee’s standard optional life insurance coverage will be continued into retirement, or if the employee is covered at the time of separation in the **Standard Opt. Life** field.

43 Indicate the employee’s amount of basic life insurance coverage based on the annual salary plus $2,000 to be continued into retirement or the amount of coverage at the time of separation in the **Life Ins** field.

44 In the **Family Life Ins** field, select whether or not the employee is entitled to continue Family Life Insurance coverage after retirement or coverage at time of separation.

45 Select the amount of additional optional life insurance the employee has chosen in the **Addt’l Opt Life Ins** field. (for example, 1 x Salary)

46 Select whether or not the employee has elected a survivor to be the beneficiary of their retirement account in the **Survivor Election** field.

47 The **Federal Tax Withholding** field identifies whether or not the employee is withholding federal taxes. Select the appropriate value.

48 Select the appropriate federal tax marital status for the employee in the **Fed Tax Mar Status** field.

49 In the **Fed Tax Allowance** field, enter the total number of exemptions claimed by the employee for Federal Tax withholding purposes after separating or the number of exemptions at the time of separation.

50 Enter the employee's electronic funds transfer routing number in the **Sep EFT Routing** field.

51 In the **Sep EFT Account Type** field, enter the employee's account type for their electronic funds transfer.

52 Enter the employee's Allotment account number in the **Sep Allot Account No**. field, if applicable.

53 Indicate if the employee ever received a refund from his or her retirement account in the **Refund Rec'd** field, if applicable.

54 Select the appropriate indicator in the **Post 56 Mil Serv Dep** field.

NOTE: Use this field to indicate, if applicable, whether a deposit was made relative to military service. This deposit would represent a percentage of the total basic pay earned during periods of military service, permitting the employee to receive credit for title and annuity computation.

55 Enter if the employee currently received a retirement annuity based on military service in the **Mil Retire Pay Rec** field.

56 Enter if the retired military employee has submitted a waiver of his/her rights to military retired pay in the **Mil Retire Pay Waiver** field.

57 In the **Curr Receipt of OWCP** field, indicate whether the employee is receiving compensation from the Office of Worker's Compensation Programs (OWCP).

58 Indicate with a "Y " or an "N" if the employee has received an incentive to separate in the **Sep Incentive** field.

59 Select the **Court Order w/ Appl.** checkbox, if a court order is part of the retirement application.

NOTE: The court order would award survivors annuity or other benefits that must be paid from the employee's annuity.

60 In the **FERS Disb Apd SSA** field, indicate if the FERS employee is retiring based on disability and has applied for Social Security benefits.

61 Enter the dollar amount of benefits the FERS employee receives from the Social Security Administration in the **SSA Benefit Amount** field, if applicable.

62 Click Save .